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10/91

TVB

A RESEARCH TREND REPORT

TRENDS

IN ADVERTISING VOLUME

The McCann-Erickson U.S. advertising volume reports represent all expenditures by U.S. advertisers - national, local, private individuals, etc. The expenditures, by medium, include all commissions as well as the art, mechanical and production expenses which are part of the advertisers' budget for each medium. *Source:* Prepared for ADVERTISING AGE by Robert J. Coen, McCann-Erickson

Prepared by the TVB Research Department

5/91

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

MEDIUM	$MILL.	1989 SHARE	% CHG	$MILL.	1990 SHARE	% CHG
NEWSPAPERS						
TOTAL	32,368	26.1%	3.8%	32,281	25.1%	-0.3%
NATIONAL	3,704	3.0%	3.7%	3,867	3.0%	4.4%
LOCAL	28,664	23.1%	3.8%	28,414	22.1%	-0.9%
MAGAZINES						
TOTAL	6,716	5.4%	10.6%	6,803	5.3%	1.3%
WEEKLIES	2,813	2.3%	6.3%	2,864	2.2%	1.8%
WOMEN'S	1,710	1.4%	13.7%	1,713	1.3%	0.2%
MONTHLIES	2,193	1.7%	14.1%	2,226	1.8%	1.5%
FARM PUBLICATION	212	0.2%	8.2%	215	0.2%	2.0%
TELEVISION						
TOTAL	26,891	21.7%	4.7%	28,405	22.1%	5.6%
NETWORK TV	9,110	7.4%	-0.7%	9,383	7.3%	3.0%
SPOT TV	7,354	5.9%	2.8%	7,788	6.1%	5.9%
NAT. SYN	1,288	1.0%	43.0%	1,589	1.2%	23.4%
LOCAL TV	7,612	6.1%	4.7%	7,856	6.1%	3.2%
CABLE NETS	1,197	1.0%	27.0%	1,393	1.1%	16.4%
CABLE LOC.	330	0.3%	29.9%	396	0.3%	20.0%
RADIO						
TOTAL	8,323	6.8%	6.7%	8,726	6.8%	4.8%
NETWORK	476	0.4%	12.0%	482	0.4%	1.3%
SPOT	1,547	1.3%	9.1%	1,635	1.3%	5.7%
LOCAL	6,300	5.1%	5.8%	6,609	5.1%	4.9%
YELLOW PAGES						
TOTAL	8,330	6.7%	7.1%	8,926	6.9%	7.2%
NATIONAL	1,011	0.8%	7.1%	1,132	0.9%	12.0%
LOCAL	7,319	5.9%	7.0%	7,794	6.0%	6.5%
DIRECT MAIL	21,945	17.7%	3.9%	23,370	18.2%	6.5%
BUSINESS PAPER	2,763	2.2%	5.9%	2,875	2.2%	4.0%
OUTDOOR						
TOTAL	1,111	0.9%	4.4%	1,084	0.8%	-2.4%
NATIONAL	653	0.5%	4.0%	640	0.5%	-2.0%
LOCAL	458	0.4%	5.0%	444	0.3%	-3.0%
MISCELLANEOUS						
TOTAL	15,271	12.3%	5.1%	15,955	12.4%	4.4%
NATIONAL	10,998	8.9%	5.2%	11,608	9.0%	5.5%
LOCAL	4,273	3.4%	4.8%	4,347	3.4%	1.7%
TOTAL						
NATIONAL	68,990	55.7%	5.2%	72,780	56.6%	5.5%
LOCAL	54,940	44.3%	4.7%	55,860	43.4%	1.7%
GRAND TOTAL	123,930	100.0%	5.0%	128,640	100.0%	3.8%

Source : McCann-Erickson, Inc.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

MEDIUM	1985 $MILL.	1985 SHARE	1986 $MILL.	1986 SHARE	1987 $MILL.	1987 SHARE	1988 $MILL.	1988 SHARE
NEWSPAPERS								
TOTAL	25,170	26.6%	26,990	26.4%	29,412	26.8%	31,197	26.4%
NATIONAL	3,352	3.5%	3,376	3.3%	3,494	3.2%	3,586	3.0%
LOCAL	21,818	23.1%	23,614	23.1%	25,918	23.6%	27,611	23.4%
MAGAZINES								
TOTAL	5,155	5.4%	5,317	5.2%	5,607	5.1%	6,072	5.1%
WEEKLIES	2,297	2.4%	2,327	2.3%	2,445	2.2%	2,646	2.2%
WOMEN'S	1,294	1.4%	1,376	1.3%	1,417	1.3%	1,504	1.3%
MONTHLIES	1,564	1.6%	1,614	1.6%	1,745	1.6%	1,922	1.6%
FARM PUBLICATION	186	0.2%	192	0.2%	196	0.2%	196	0.2%
TELEVISION								
TOTAL	21,022	22.2%	22,881	22.4%	23,904	21.8%	25,686	21.8%
NETWORK TV	8,060	8.5%	8,342	8.2%	8,500	7.8%	9,172	7.8%
SPOT TV	6,004	6.3%	6,570	6.4%	6,846	6.2%	7,147	6.1%
NAT. SYN	520	0.5%	600	0.6%	762	0.7%	901	0.8%
LOCAL TV	5,714	6.0%	6,514	6.4%	6,833	6.2%	7,270	6.2%
CABLE NETS	594	0.6%	676	0.7%	760	0.7%	942	0.8%
CABLE LOC.	130	0.3%	179	0.1%	203	0.2%	254	0.1%
RADIO								
TOTAL	6,490	6.8%	6,949	6.8%	7,206	6.6%	7,798	6.6%
NETWORK	365	0.4%	423	0.4%	413	0.4%	425	0.4%
SPOT	1,335	1.4%	1,348	1.3%	1,330	1.2%	1,418	1.2%
LOCAL	4,790	5.0%	5,178	5.1%	5,463	5.0%	5,955	5.0%
YELLOW PAGES								
TOTAL	5,800	6.1%	6,500	6.4%	7,300	6.7%	7,781	6.6%
NATIONAL	695	0.7%	759	0.7%	830	0.8%	944	0.8%
LOCAL	5,105	5.4%	5,741	5.7%	6,470	5.9%	6,837	5.8%
DIRECT MAIL	15,500	16.4%	17,145	16.8%	19,111	17.4%	21,115	17.9%
BUSINESS PAPER	2,375	2.5%	2,382	2.3%	2,458	2.2%	2,610	2.2%
OUTDOOR								
TOTAL	945	1.0%	985	1.0%	1,025	0.9%	1,064	0.9%
NATIONAL	610	0.6%	600	0.6%	615	0.6%	628	0.5%
LOCAL	335	0.4%	385	0.4%	410	0.3%	436	0.4%
MISCELLANEOUS								
TOTAL	12,107	12.8%	12,799	12.5%	13,431	12.3%	14,531	12.3%
NATIONAL	8,604	9.1%	9,120	8.9%	9,703	8.8%	10,454	8.9%
LOCAL	3,503	3.7%	3,679	3.6%	3,728	3.5%	4,077	3.4%
TOTAL								
NATIONAL	53,355	56.3%	56,850	55.7%	60,625	55.3%	65,610	55.6%
LOCAL	41,395	43.7%	45,290	44.3%	49,025	44.7%	52,440	44.4%
GRAND TOTAL	94,750	100.0%	102,140	100.0%	109,650	100.0%	118,050	100.0%

Source : McCann-Erickson, Inc.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

MEDIUM	1981 $MILL.	1981 SHARE	1982 $MILL.	1982 SHARE	1983 $MILL.	1983 SHARE	1984 $MILL.	1984 SHARE
NEWSPAPERS								
TOTAL	16,528	27.4%	17,694	26.6%	20,582	27.1%	23,522	26.8%
NATIONAL	2,259	3.7%	2,452	3.7%	2,734	3.6%	3,081	3.5%
LOCAL	14,269	23.7%	15,242	22.9%	17,848	23.5%	20,441	23.3%
MAGAZINES								
TOTAL	3,533	5.8%	3,710	5.6%	4,233	5.6%	4,932	5.6%
WEEKLIES	1,598	2.6%	1,659	2.5%	1,917	2.5%	2,224	2.5%
WOMEN'S	853	1.4%	904	1.4%	1,056	1.4%	1,209	1.4%
MONTHLIES	1,082	1.8%	1,147	1.7%	1,260	1.7%	1,499	1.7%
FARM PUBLICATION	146	0.2%	148	0.2%	163	0.2%	181	0.2%
TELEVISION								
TOTAL	12,846	21.3%	14,636	22.0%	16,759	22.1%	19,848	22.6%
NETWORK TV	5,540	9.2%	6,144	9.2%	6,955	9.2%	8,318	9.5%
SPOT TV	3,746	6.2%	4,364	6.6%	4,827	6.4%	5,488	6.2%
NAT. SYN	75	0.1%	150	0.2%	300	0.4%	420	0.5%
LOCAL TV	3,368	5.6%	3,765	5.7%	4,345	5.7%	5,084	5.8%
CABLE NETS	100	0.2%	181	0.3%	282	0.4%	458	0.5%
CABLE LOC.	17	0.0%	32	0.0%	50	0.0%	80	0.1%
RADIO								
TOTAL	4,230	7.0%	4,670	7.0%	5,210	6.9%	5,817	6.6%
NETWORK	230	0.4%	255	0.4%	296	0.4%	320	0.4%
SPOT	879	1.5%	923	1.4%	1,038	1.4%	1,197	1.4%
LOCAL	3,121	5.1%	3,492	5.2%	3,876	5.1%	4,300	4.8%
YELLOW PAGES								
TOTAL	3,300	5.5%	3,800	5.7%	4,400	5.8%	4,900	5.6%
NATIONAL	380	0.6%	433	0.7%	489	0.6%	580	0.7%
LOCAL	2,920	4.9%	3,367	5.0%	3,911	5.2%	4,320	4.9%
DIRECT MAIL	8,944	14.8%	10,319	15.5%	11,795	15.6%	13,800	15.7%
BUSINESS PAPER	1,841	3.0%	1,876	2.8%	1,990	2.6%	2,270	2.6%
OUTDOOR								
TOTAL	650	1.1%	721	1.1%	794	1.0%	872	1.0%
NATIONAL	419	0.7%	465	0.7%	512	0.7%	562	0.6%
LOCAL	231	0.4%	256	0.4%	282	0.3%	310	0.4%
MISCELLANEOUS								
TOTAL	8,412	13.9%	9,006	13.5%	9,924	13.1%	11,678	13.3%
NATIONAL	5,798	9.6%	6,365	9.6%	6,911	9.1%	8,083	9.2%
LOCAL	2,614	4.3%	2,641	3.9%	3,013	4.0%	3,595	4.1%
TOTAL								
NATIONAL	33,890	56.1%	37,785	56.8%	42,525	56.1%	49,690	56.6%
LOCAL	26,540	43.9%	28,795	43.2%	33,325	43.9%	38,130	43.4%
GRAND TOTAL	60,430	100.0%	66,580	100.0%	75,850	100.0%	87,820	100.0%

Source : McCann-Erickson, Inc.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

MEDIUM	1977 $MILL.	1977 SHARE	1978 $MILL.	1978 SHARE	1979 $MILL.	1979 SHARE	1980 $MILL.	1980 SHARE
NEWSPAPERS								
TOTAL	10,751	28.7%	12,214	28.2%	13,863	28.4%	14,794	27.6%
NATIONAL	1,472	3.9%	1,541	3.6%	1,770	3.6%	1,963	3.7%
LOCAL	9,279	24.8%	10,673	24.6%	12,093	24.8%	12,831	23.9%
MAGAZINES								
TOTAL	2,162	5.8%	2,597	6.0%	2,932	6.0%	3,149	5.9%
WEEKLIES	903	2.4%	1,158	2.7%	1,327	2.7%	1,418	2.6%
WOMEN'S	565	1.5%	672	1.6%	730	1.5%	782	1.5%
MONTHLIES	694	1.9%	767	1.7%	875	1.8%	949	1.8%
FARM PUBLICATION	90	0.2%	104	0.2%	120	0.2%	130	0.2%
TELEVISION								
TOTAL	7,612	20.3%	8,955	20.7%	10,154	20.8%	11,469	21.4%
NETWORK TV	3,460	9.2%	3,975	9.2%	4,599	9.4%	5,130	9.6%
SPOT TV	2,204	5.9%	2,607	6.0%	2,873	5.9%	3,269	6.1%
NAT. SYN	----	----	----	----	----	----	50	0.1%
LOCAL TV	1,948	5.2%	2,373	5.5%	2,682	5.5%	2,967	5.5%
CABLE NETS	----	----	----	----	----	----	45	0.1%
CABLE LOC.	----	----	----	----	----	----	8	0.0%
RADIO								
TOTAL	2,634	7.0%	3,052	7.0%	3,310	6.8%	3,702	6.9%
NETWORK	137	0.4%	147	0.3%	161	0.3%	183	0.3%
SPOT	546	1.5%	620	1.4%	665	1.4%	779	1.5%
LOCAL	1,951	5.1%	2,285	5.3%	2,484	5.1%	2,740	5.1%
YELLOW PAGES								
TOTAL	----	----	----	----	----	----	2,900	5.4%
NATIONAL	----	----	----	----	----	----	330	0.6%
LOCAL	----	----	----	----	----	----	2,570	4.8%
DIRECT MAIL	5,164	13.8%	5,987	13.8%	6,653	13.6%	7,596	14.2%
BUSINESS PAPER	1,221	3.3%	1,400	3.2%	1,575	3.2%	1,674	3.1%
OUTDOOR								
TOTAL	418	1.1%	466	1.1%	540	1.1%	578	1.1%
NATIONAL	290	0.8%	307	0.7%	355	0.7%	364	0.7%
LOCAL	128	0.3%	159	0.4%	185	0.4%	214	0.4%
MISCELLANEOUS								
TOTAL	7,388	19.8%	8,555	19.8%	9,633	19.9%	7,558	14.2%
NATIONAL	3,849	10.3%	4,435	10.2%	4,992	10.2%	5,153	9.6%
LOCAL	3,539	9.5%	4,120	9.6%	4,641	9.7%	2,405	4.6%
TOTAL								
NATIONAL	20,595	55.0%	23,720	54.7%	26,695	54.7%	29,815	55.7%
LOCAL	16,845	45.0%	19,610	45.3%	22,085	45.3%	23,735	44.3%
GRAND TOTAL	37,440	100.0%	43,330	100.0%	48,780	100.0%	53,550	100.0%

Source : McCann-Erickson, Inc.

TOTAL ADVERTISING VOLUME IN THE UNITED STATES

MEDIUM	1973 $MILL.	1973 SHARE	1974 $MILL.	1974 SHARE	1975 $MILL.	1975 SHARE	1976 $MILL.	1976 SHARE
NEWSPAPERS								
TOTAL	7,481	29.9%	7,842	29.5%	8,234	29.5%	9,618	28.9%
NATIONAL	1,049	4.2%	1,105	4.2%	1,109	4.0%	1,342	4.0%
LOCAL	6,432	25.7%	6,737	25.3%	7,125	25.5%	8,276	24.9%
MAGAZINES								
TOTAL	1,448	5.8%	1,504	5.6%	1,465	5.3%	1,789	5.4%
WEEKLIES	583	2.3%	630	2.4%	612	2.2%	748	2.2%
WOMEN'S	362	1.4%	372	1.4%	368	1.3%	457	1.4%
MONTHLIES	503	2.1%	502	1.8%	485	1.8%	584	1.8%
FARM PUBLICATION	65	0.3%	72	0.3%	74	0.3%	86	0.3%
TELEVISION								
TOTAL	4,460	17.9%	4,854	18.2%	5,263	18.9%	6,721	20.2%
NETWORK TV	1,968	7.9%	2,145	8.1%	2,306	8.3%	2,857	8.6%
SPOT TV	1,377	5.5%	1,497	5.6%	1,623	5.8%	2,154	6.5%
NAT. SYN	----	----	----	----	----	----	----	----
LOCAL TV	1,115	4.5%	1,212	4.6%	1,334	4.8%	1,710	5.1%
CABLE NETS	----	----	----	----	----	----	----	----
CABLE LOC.	----	----	----	-0.1%	----	----	----	----
RADIO								
TOTAL	1,723	6.9%	1,837	6.9%	1,980	7.1%	2,330	7.0%
NETWORK	68	0.3%	69	0.3%	83	0.3%	105	0.3%
SPOT	400	1.6%	405	1.5%	436	1.6%	518	1.6%
LOCAL	1,255	5.0%	1,363	5.1%	1,461	5.2%	1,707	5.1%
YELLOW PAGES								
TOTAL	----	----	----	----	----	----	----	----
NATIONAL	----	----	----	----	----	----	----	----
LOCAL	----	----	----	----	----	----	----	----
DIRECT MAIL	3,698	14.8%	4,054	15.2%	4,124	14.8%	4,786	14.4%
BUSINESS PAPER	865	3.5%	900	3.4%	919	3.3%	1,035	3.1%
OUTDOOR								
TOTAL	308	1.2%	309	1.2%	335	1.2%	383	1.2%
NATIONAL	200	0.8%	203	0.8%	220	0.8%	252	0.8%
LOCAL	108	0.4%	106	0.4%	115	0.4%	131	0.4%
MISCELLANEOUS *								
TOTAL	4,932	19.7%	5,248	19.7%	5,506	19.6%	6,552	19.5%
NATIONAL	2,562	10.3%	2,746	10.3%	2,841	10.2%	3,431	10.3%
LOCAL	2,370	9.4%	2,502	9.4%	2,665	9.4%	3,121	9.2%
TOTAL								
NATIONAL	13,700	54.8%	14,700	55.2%	15,200	54.5%	18,355	55.1%
LOCAL	11,280	45.2%	11,920	44.8%	12,700	45.5%	14,945	44.9%
GRAND TOTAL	24,980	100.0%	26,620	100.0%	27,900	100.0%	33,300	100.0%

Source : McCann-Erickson, Inc.
*** Miscellaneous includes Yellow Pages prior to 1980.**

TOTAL ADVERTISING VOLUME IN THE UNITED STATES (IN MILLIONS)

MEDIUM	1965	1966	1967	1968	1969	1970	1971	1972
NEWSPAPERS								
TOTAL	4,426	4,865	4,910	5,232	5,714	5,704	6,167	6,938
NATIONAL	784	887	846	889	943	891	972	1,062
LOCAL	3,642	3,978	4,064	4,343	4,771	4,813	5,195	5,876
MAGAZINES								
TOTAL	1,161	1,254	1,245	1,283	1,344	1,292	1,370	1,440
WEEKLIES	610	658	651	657	662	617	626	610
WOMEN'S	269	280	282	284	308	301	340	368
MONTHLIES	282	316	312	342	374	374	404	462
FARM PUBLICATION	71	70	68	68	64	62	57	59
TELEVISION								
TOTAL	2,515	2,823	2,909	3,231	3,585	3,596	3,534	4,091
NETWORK TV	1,237	1,393	1,455	1,523	1,678	1,658	1,593	1,804
SPOT TV	892	988	988	1,131	1,253	1,234	1,145	1,318
NAT. SYN	----	----	----	----	----	----	----	----
LOCAL TV	386	442	466	577	654	704	796	969
CABLE NETS	----	----	----	----	----	----	----	----
CABLE LOC.	----	----	----	----	----	----	----	----
RADIO								
TOTAL	917	1,010	1,048	1,190	1,264	1,308	1,445	1,612
NETWORK	60	63	64	63	59	56	63	74
SPOT	275	308	314	360	368	371	395	402
LOCAL	582	639	670	767	837	881	987	1,136
YELLOW PAGES								
TOTAL	----	----	----	----	----	----	----	----
NATIONAL	----	----	----	----	----	----	----	----
LOCAL	----	----	----	----	----	----	----	----
DIRECT MAIL	2,324	2,461	2,488	2,612	2,670	2,766	3,067	3,420
BUSINESS PAPER	671	712	707	714	752	740	720	781
OUTDOOR								
TOTAL	180	178	191	208	213	234	261	292
NATIONAL	120	118	126	137	138	154	172	192
LOCAL	60	60	65	71	75	80	89	100
MISCELLANEOUS *								
TOTAL	2,985	3,257	3,304	3,552	3,814	3,848	4,079	4,577
NATIONAL	1,745	1,896	1,909	2,020	2,131	2,126	2,201	2,428
LOCAL	1,240	1,361	1,395	1,532	1,683	1,722	1,878	2,149
TOTAL								
NATIONAL	9,340	10,150	10,210	10,800	11,400	11,350	11,755	12,980
LOCAL	5,910	6,480	6,660	7,290	8,020	8,200	8,945	10,230
GRAND TOTAL	15,250	16,630	16,870	18,090	19,420	19,550	20,700	23,210

Source : McCann-Erickson, Inc.
*** Miscellaneous includes Yellow Pages prior to 1980.**

TOTAL ADVERTISING VOLUME IN THE UNITED STATES (IN MILLIONS)

MEDIUM	1957	1958	1959	1960	1961	1962	1963	1964
NEWSPAPERS								
TOTAL	3,268	3,176	3,526	3,681	3,601	3,659	3,780	4,120
NATIONAL	768	724	773	778	744	722	702	773
LOCAL	2,500	2,452	2,753	2,903	2,857	2,937	3,078	3,347
MAGAZINES								
TOTAL	777	734	832	909	895	942	1,002	1,074
WEEKLIES	451	425	479	525	508	519	540	583
WOMEN'S	165	151	168	184	187	200	218	231
MONTHLIES	161	158	185	200	200	223	244	260
FARM PUBLICATION	71	67	71	66	62	65	66	66
TELEVISION								
TOTAL	1,286	1,387	1,529	1,627	1,691	1,897	2,032	2,289
NETWORK TV	690	742	776	820	887	976	1,025	1,132
SPOT TV	352	397	486	527	548	629	698	806
NAT. SYN	----	----	----	----	----	----	----	----
LOCAL TV	244	248	267	280	256	292	309	351
CABLE NETS	----	----	----	----	----	----	----	----
CABLE LOC.	----	----	----	----	----	----	----	----
RADIO								
TOTAL	618	620	656	693	683	736	789	846
NETWORK	63	58	44	43	43	46	56	59
SPOT	187	190	206	222	220	233	243	256
LOCAL	368	372	406	428	420	457	490	531
YELLOW PAGES								
TOTAL	----	----	----	----	----	----	----	----
NATIONAL	----	----	----	----	----	----	----	----
LOCAL	----	----	----	----	----	----	----	----
DIRECT MAIL	1,471	1,589	1,688	1,830	1,850	1,933	2,078	2,184
BUSINESS PAPER	568	525	569	609	578	597	615	623
OUTDOOR								
TOTAL	199	192	193	203	180	171	171	175
NATIONAL	134	130	130	137	122	115	115	117
LOCAL	65	62	63	66	58	56	56	58
MISCELLANEOUS *								
TOTAL	2,012	2,020	2,206	2,342	2,320	2,430	2,567	2,773
NATIONAL	1,169	1,184	1,280	1,364	1,366	1,437	1,520	1,630
LOCAL	843	836	926	978	954	993	1,047	1,143
TOTAL								
NATIONAL	6,250	6,340	6,855	7,305	7,315	7,695	8,120	8,720
LOCAL	4,020	3,970	4,415	4,655	4,545	4,735	4,980	5,430
GRAND TOTAL	10,270	10,310	11,270	11,960	11,860	12,430	13,100	14,150

Source : McCann-Erickson, Inc.
*** Miscellaneous includes Yellow Pages prior to 1980.**